







A service of Quest Diagnostics"

# Oueslest, health tests you choose.



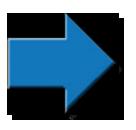
- I. Current Drivers
- II. Mandatory Building Blocks
- III. Quest Diagnostics' Approach
- IV. Early Results and Learning
- V. Future Drivers
- VI. Q&A



#### Consumerism



Today's Consumers



Want control

- Are increasingly educated
- Have access to health information through the Internet



#### **Health Fairs and Resellers**



#### **Explosion in Direct Providers**



#### **Home Test Kits**



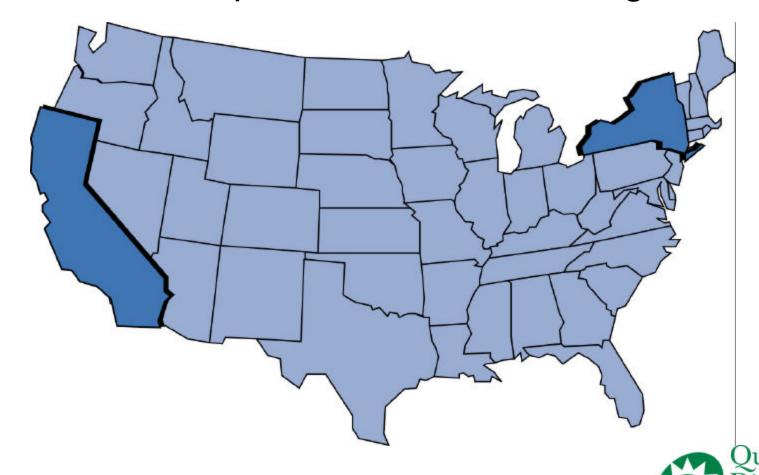




#### **New York and California**



#### New Laws Impact Consumer Testing





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### **Mandatory Building Blocks**



**Patience** 

**Consumer Payment Collection System** 

**Health Dept. Reporting Protocol** 

**Call Center/Customer Service** 

**Consumer-Friendly Results Report** 

**Legal Due Diligence** 





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### **Our Philosophy**



- Tests menu limited to tests appropriate for consumers
- Most tests are inappropriate for consumer order
  - Complex medical conditions
  - Difficult to understand or interpret
  - Serious symptomatic illnesses
  - Uncommon medical conditions



### Our Philosophy



- III. Utilize independent physicians
  - Review test requests
  - Order
  - Authorize release of results
  - Contact consumer if results are critical
  - Provide explanations
- IV. Do not diagnose or treat disease
- V. QuesTest<sup>™</sup> services used in context of relationship with physician



#### **Product – Test Menu**



#### QuestTest<sup>™</sup> Services

#### **Diabetes**

- Diabetes Monitoring Panel
- Diabetes Screen

#### Health Profiles

- Women's Health Profile
- Men's Health Profile
- Men's Health Profile Plus PSA
- Complete Blood Count (CBC)
- Urinalysis

#### Drug Screen

- Drug Screen
- THC Screen
- THC Quantitative

#### Allergy Panels

- Food Allergy Panel
- Indoor Allergy Panel
- Outdoor Allergy



#### **Product – Test Menu**



#### QuestTest<sup>™</sup> Services

#### **Heart Health**

- Risk Panel (includes Cholesterol)
- Homocysteine

#### **Specific Conditions**

- Gout Screening and Monitoring
- Liver Health Panel
- PSA (Prostate Specific Antigen)
- Thyroid Health Screen

#### Infections

- STD Screen
- Hepatitis C

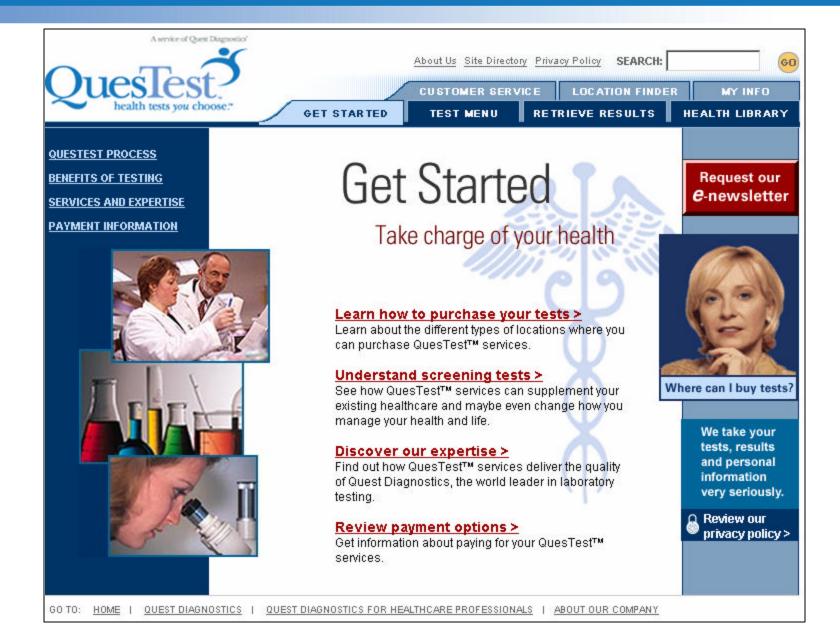
#### Other Concerns

- Anemia Screening Panel
- Blood Type
- Pregnancy Test (Blood)
- Nutrition & Vitamin Panel



### Web Site (www.questest.com)

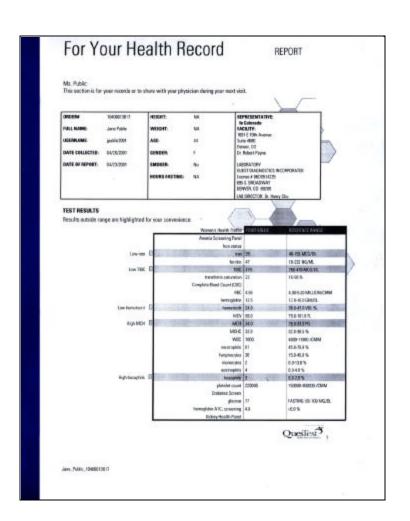




### Product – Results Report



- Introductory letter
- Topline summary (showing out of range)
- Individual analyte explanations
- Physician-friendly summary





### **Delivery Systems – PSC**



- Gets information via ad, Patient Service Center (PSC) display, or web site
- Registers via call center and receives secure ID for web access
- 3. Physician network approves order





### **Delivery Systems – PSC**



- Consumer visits PSC, pays and provides specimen
- Physician network releases results
- Consumer receives results in mail and/or on-line





### Delivery Systems – Retailer



- Purchases card at retailer
- Registers via call center and receives secure ID for web access
- 3. Physician network approves order





### Delivery Systems – Retailer



- 4. Consumer visits PSC and provides specimen
- 5. Physician network releases results
- Consumer receives results in mail and/or on-line







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### Tremendous Press Interest



- Wall Street Journal
- **New York Times**
- Time Magazine
- Good Housekeeping
- Heavy local print, radio and TV



#### Reprinted from THE WALL STREET JOURNAL

# TIME Good Housekeeping

The New Hork Times



### **Industry Reactions**



#### Physicians (minimal):

- Free consults
- Consumers not capable
- Bypassing me
- False positives/negatives
- Won't proactively address issues



### **Industry Reactions**



#### Managed Care:

 Primary concern is claim slipping past back office billing



#### Purchaser Profile



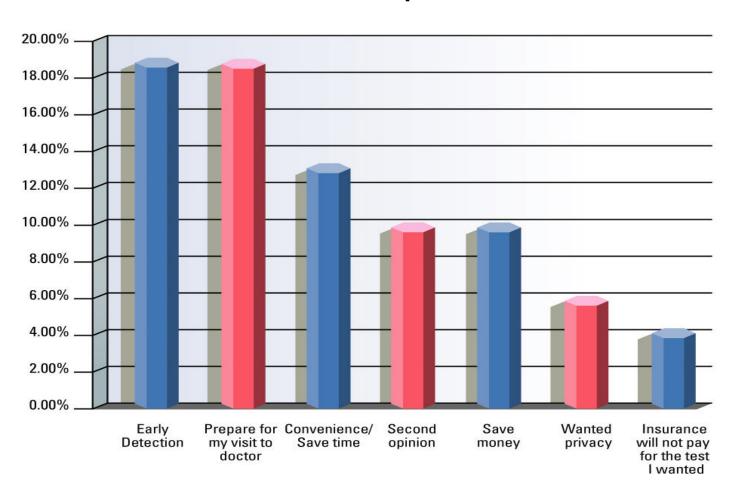
- Upscale
- Older
- Both male and female (slight skew male)
- Educated
- Worried-well



#### Reasons for Purchase



## Primary Purchase Drivers are Detection, Convenience and Preparation



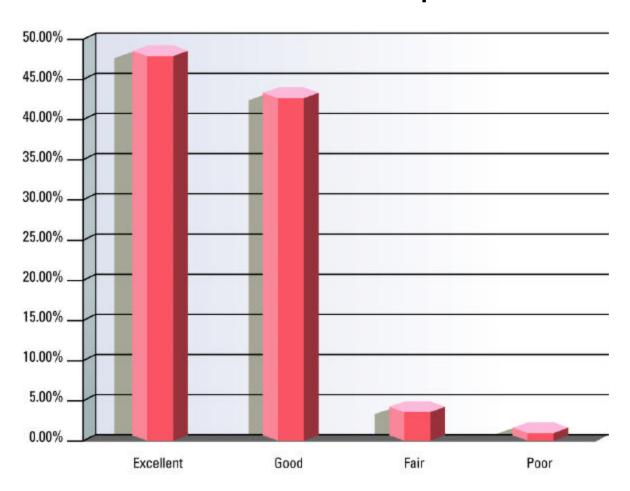
#### **Other Reasons**

- I am worried about my health
- Follow-up test
- Don't have a doctor
- Prior to insurance application/test
- Don't have medical insurance
- Doctor referred
- Don't trust home test kit

#### **Customer Satisfaction**



# High Customer Satisfaction with QuestTest Purchase Experience







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#### **Future Drivers**



- Significant penetration of consumer-driven healthcare plans
- Increased pharmaceutical marketing shift from patient/doctor to consumer
- Focused effort by major retailers to develop screening/wellness



#### **Future Drivers**



- Availability of actionable gene-based testing
- Increased state legislation allowing direct access (could also be limiting)
- Consumer awareness of screening and access to information





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